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# FOREIGN CROPS AND MARKETS

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## LATE CABLES...

Rainfall Canadian Prairie Provinces fairly general but varied from light to heavy. Conditions materially improved in eastern Alberta. Feed situation relieved in Saskatchewan but rain too late to help wheat crop. Declines noted in northeastern area where practically all the commercial wheat crop will be obtained. Dry areas of western Manitoba received no rain, and crops suffering. Other sections fair to good but rust continues to be serious threat. If good weather prevails, early sown crops may mature so rapidly that yield and quality will not be affected. Grasshoppers numerous and active in parts of all 3 Provinces. (Dominion Bureau of Statistics, Ottawa.)

In great part of Argentine wheat and flax regions work on land is backward and conditions for sowing unfavorable. Weather in Provinces of Buenos Aires and Entre Rios favorable. (International Institute of Agriculture, Rome.)

Rumania provisional estimate of 1937 bread-grain production placed as follows, with 1936 comparisons in parentheses: Wheat 128,602,000 bushels (128,717,000), rye 15,747,000 bushels (17,842,000). (International Institute of Agriculture, Rome.)

Italy 1937 area sown to specified crops reported as follows, with percentage relation to 1936 acreage in parentheses: Spring corn 3,197,000 acres (98.8 percent), potatoes 962,000 acres (99.8), flax 25,000 acres (126.2).

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## GRAINS

German grain regulations for 1937-38

The German grain regulations issued by the Minister of Agriculture on July 1, 1937, intensified and expanded the existing control system for the crop year 1937-38, it was pointed out by the Berlin office of the Bureau of Agricultural Economics. This is especially true with regard to efforts to influence or control flour types and bread consumption. In order to discourage consumption, bread containing 20 percent or more of rye flour may not be sold until the day after it has been baked. The use of rye and wheat for distilling purposes continues to be forbidden, and the same prohibition has been extended to all kinds of grain.

The high milling extraction for rye (up to 80 percent), as well as that for wheat (about 78 percent), will be retained in 1937-38. As much corn meal and potato flour will be mixed with wheat flour and rye flour as is possible and still maintain a good baking quality. The admixture of corn meal to wheat is to be made by the flour mills instead of by the bakers as hitherto. This will insure more uniform mixing and guarantee that all household flour will contain corn meal.

In an ordinance of March 23, 1937, it was ruled that the basic prices fixed for domestic wheat, feed barley, and feed oats for 1936-37 would remain unchanged, but that the price to producers for rye would be increased by 20 marks per metric ton (about 20 cents per bushel) over the 1936-37 price. An interesting feature of the prices fixed for rye is that they are markedly increased until about April when they begin a decrease which is continued until the end of the season. As an example of the way in which grain prices have been fixed for various parts of Germany see table, page 60, giving the prices applying in the Central District for 1936-37 and 1937-38.

The oriental wheat marketsChina

In order to control prices and prevent excessive speculations, the Chinese Ministry of Industries fixed maximum futures prices for wheat and flour on the Shanghai exchange as of July 3, it was reported by radio-gram from the Shanghai office of the Bureau of Agricultural Economics. Regulations governing the operations of the wheat and flour exchange were issued on July 6. Traders on the exchange are not permitted to accept accounts for persons other than millers and recognized grain dealers. All accounts of traders, dealers, and millers are subject to inspection by the Ministry of Industries, to whom a daily report must be made of all business transacted. In addition to the fixing of futures prices, all exportation of wheat from China was prohibited until June 1938.

The prices fixed by the Ministry of Industries on July 3 were as follows: Wheat for July delivery 92 cents per bushel, August 96, September 99, October 101, November 102 cents per bushel; flour for July delivery \$1.10 per bag of 49 pounds, August \$1.12, September \$1.13, October \$1.14, November \$1.15.

Spot prices of wheat and flour on July 16 showed an upward tendency. Best quality domestic wheat was quoted at 97 cents per bushel, and standard domestic flour was \$1.24 per bag of 49 pounds. Australian wheat was nominally quoted at \$1.36 per bushel and Australian flour, c.i.f. Hong Kong, at \$5.16 per barrel of 196 pounds.

### Japan

Imports of wheat into Japan throughout the 1937-38 season are expected to be small, Agricultural Commissioner O. L. Dawson reports. They will be chiefly of Manchurian and Canadian grain and used primarily for high-grade flour production. Flour imports probably will be smaller than in 1936-37, when relatively large takings resulted from speculation, leaving some stocks still on hand. Not only is the 1937 wheat crop estimated to be more than that of 1936, but carryover stocks of wheat are also placed at about 2,200,000 bushels as compared with 1,100,000 bushels last year. Furthermore, Manchuria, the principal export market for Japanese flour, also is expected to have a larger wheat crop this year. If so, that country will approach self-sufficiency in wheat, and an increase in the import duty on flour is anticipated.

JAPAN: Imports of wheat by countries of origin and total exports of flour, May 1936 and 1937, July-May 1935-36 and 1936-37

Country and item	May		July-May	
	1936	1937	1935-36	1936-37
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Imports of wheat:				
United States.....	-	-	92	129
Canada .....	375	112	1,868	2,433
Australia.....	346	112	10,333	2,385
Argentina.....	-	73	630	444
Manchuria.....	11	a/ 168	897	1,122
China.....	-	-	-	751
Others.....	-	-	270	63
Total.....	732	465	14,090	7,327
	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels
Exports of flour..	162	57	2,106	920

Shanghai office, Bureau of Agricultural Economics.

According to Consul Garrels at Tokyo, prices of domestic wheat at that market declined during June, as a result of arrivals of new-crop



wheat. Domestic flour prices declined also, but prices, c.i.f. Dairen, increased. Wheat at the mill on July 1 was quoted as follows, import duty and landing charges included: Western White No. 2, old-crop, \$1.69 per bushel, new-crop, \$1.66; Canadian No. 1, \$1.98, No. 3, \$1.90; Australian \$1.55; Manchurian \$1.59 per bushel. Domestic standard wheat was \$1.13 per bushel and Portland wheat, c.i.f. Yokohama, \$1.31, duty and landing charges excluded. The wholesale price of flour at the mill on July 1 was \$1.21 per bag of 49 pounds; c.i.f. Dairen, \$1.20.

#### The crop situation in the Soviet Union

Spring sowings were practically completed in the Soviet Union by the beginning of June, with sowing of late crops continuing during the first 3 weeks of the month, according to reports from the Berlin office of the Bureau of Agricultural Economics. The total acreage put in by June 20 amounted to 224,000,000 acres which is slightly below that of a year earlier. This year's spring sowing plan was 97 percent completed by June 20 as compared with 100-percent execution reported for the same date a year earlier. Sowings were backward in the early stages in a number of regions despite the earlier spring in most of the European part of the Union.

Among the reasons for insufficient progress of field work were mentioned the breaking down of tractors, shortage of additional parts, delayed transportation of tractor fuel, and fear of the tractor operators to exceed their expenditure norms for fuel during the first days of the campaign when the soil was still wet. There is no doubt, however, that post-drought conditions also were a very important factor in this year's spring campaign. The seed, food, and feed loans granted by the Government this year created an additional organizational burden of considerable scope and scattered statements indicate that there were delays in the distribution of such loans in a number of regions. Feed and food difficulties were probably also experienced in some of the drought-stricken regions in the spring and have probably reduced the working ability of the people and also of draft animals. The efforts to speed up sowings may have resulted in less attention being paid to the quality of the field work, at least in some cases.

Seed material was apparently of a poorer quality, especially in the drought area, and reports indicated that local Government organizations have shown a tendency to accept a lower grade of seed. The Government's intention to plant a larger acreage with selected seeds in the spring of 1937 could not be carried out fully because of the shortage of such seeds. Mismanagement was also reported in the organizations in charge of the selected-seed problem.

The present crop outlook for the Soviet Union as a whole is indicated to be very promising by all Soviet press reports. Numerous comments stress that favorable reports are received from almost all parts of the country.

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On the other hand, it should be borne in mind that the usual tendency in the Soviet Union to overestimate early crop prospects is likely to be quite pronounced in a post-drought year like the present one. Furthermore, the post-drought difficulties under which Soviet agriculture had to labor this year (shortage and low quality of seed, etc.), as well as the drive against "wrecking" and "sabotage", are also important factors affecting unfavorably the agricultural situation. The lagging spring sowings in the early part of the campaign this year, as well as the somewhat unfavorable weather conditions in the spring, would also militate against expectation of very high yields accredited to some Soviet sources.

While May was dry in the southern regions, weather conditions during the first 3 weeks of June were favorable. Crops profited greatly from the widespread rains. No excessive heat was experienced during the period. Frequent rains provided an abundant moisture supply in many important regions. Rainfall, however, was less abundant in southwestern Ukraine, in the Stalingrad region (Lower Volga), and in most of Kasakstan. A shortage of moisture was probably experienced in these regions.

An official report as of June 20 indicated prospects for winter rye to be very favorable with little probability of future deterioration. Winter wheat prospects were favorable in most regions of the south. It had already ripened in the mid-Asiatic republics (Turkestan) and harvesting had started under favorable weather conditions. In the important spring wheat producing regions, weather conditions were indicated to be quite favorable with frequent rains and moderately warm weather.

Taking the important southern area of the Union as a whole, present crop prospects have been indicated as good, particularly after the rains during the first half of June. Winter cereals are especially promising. Abundant snowfall in the southern sections of the Union in 1936-37 has supplied necessary winter and spring moisture so important in the steppe regions. Lodging is reported from the Kuban district as a result of heavy filling of grain and abundant June rains.

An early harvest is expected this year, particularly in the southern regions of European Russia. Soviet reports, however, reveal a considerable lack of preparedness in all regions, including those where harvesting is about to begin. Repairs of agricultural machinery are as usual lagging behind, the erection of sheds and barns has been disregarded, and weeding of fields on which combine harvesting is to take place has not been organized.

The slow development of combine repairs is apparently giving the authorities particular cause for anxiety. Only half of all combines in

the hands of the Machine Tractor Stations, for example, were reported overhauled by June 10 this year as compared with 83 percent at the same date a year earlier. It is not likely that the southern regions will be in a position to begin the harvesting campaign very well equipped.

The lagging behind of combine repairs is rendered more serious by the fact that combines are expected to harvest a much larger acreage this year. According to the plan, 91,000,000 acres are to be harvested by them as compared with less than 50,000,000 acres a year ago. The bulk of all cereals in the steppe regions is to be harvested by combines. The number likewise is supposed to be increased accordingly, but, judging from present reports, deliveries of new machines have been behind expectations.

#### RICE

##### Japanese rice stocks above last year

Japanese rice stocks for July 1 amounted to 8,767,000,000 pounds compared with 8,252,000,000 pounds on the same date a year ago, according to official estimates furnished by American Consul General Garrels at Tokyo and forwarded by the Shanghai office of the Bureau of Agricultural Economics. Japanese imports of rice from Korea and Formosa for the 4 months July to October are estimated at 1,454,000,000 pounds. The carry-over of rice on October 31, 1937, is estimated at 2,978,000,000 pounds, compared with the carry-over of 2,579,000,000 pounds a year earlier. No official estimates on acreage or production for the 1937 rice crop have yet been made.

#### COTTON

##### Record cotton crop indicated for China

Indications are that the 1937 cotton crop of China, including Manchuria, will reach an all-time record of approximately 4,000,000 bales of 500 pounds each compared with the previous record of 3,700,000 bales last season, according to a radiogram just received in the Bureau of Agricultural Economics from its Shanghai office. The forecast is based on an estimated increase of from 10 to 15 percent in plantings over last year and on the belief that the yield for the season will be slightly above the average of recent years. Weather conditions during the past month and a half have favored the progress of the new crop.

Chinese imports of foreign cotton during October-May 1936-37 amounted to 62,963 bales as against 135,975 bales in a similar period a year ago. The decline was chiefly at the expense of American and Indian cotton, while imports from Egypt and from other unspecified sources have increased.



The July prices of Chinese cotton for immediate and future delivery were 12 and 11.91 cents per pound, respectively, compared with June quotations of 13 and 13.2 cents per pound. American cotton for immediate delivery was quoted at 17 cents as against 16.82 cents per pound a month ago. The price of Indian for immediate delivery declined from 13 to 12.5 cents per pound.

May mill consumption remained at a high level, amounting to 258,000 bales. A considerable volume of yarn was sold for future delivery. Yarn for September delivery was quoted at 18.14 cents per pound as against 20.28 cents a month ago.

CHINA: Imports of raw cotton in May 1937, with comparisons  
(In bales of 500 pounds)

Growth	May		October-May	
	1936	1937	1935-36	1936-37
	<u>Bales</u>	<u>Bales</u>	<u>Bales</u>	<u>Bales</u>
American.....	2,810	1,185	45,754	11,937
Indian.....	34,270	2,105	73,133	9,437
Egyptian.....	1,308	1,686	16,401	21,324
Others.....	332	3,601	687	20,265
Total.....	38,720	8,577	135,975	62,963

Shanghai office, Bureau of Agricultural Economics.

Egyptian cotton acreage increased

The official estimate of the Egyptian Government on cotton acreage under cultivation for the 1937-38 harvest has just been released, according to a cablegram from the International Institute of Agriculture at Rome. The area of 2,053,000 acres estimated for this year is 15 percent above the 1,781,000 acres planted for the 1936-37 crop and is the second highest on record. An area of 2,162,000 acres was planted for harvest in 1930-31, the only year in which the acreage has been above 2,000,000 acres until this year.

The production in 1936-37 from the 1,781,000 acres was a record high of 1,887,000 bales of 478 pounds. This is accounted for by the unusually high yield of 506 pounds per acre, the highest yield since 1920-21. If yields are as high this year as last, a production of 2,170,000 bales would result. Even with a yield of 416 pounds per acre, the lowest in the past 5 years, the 1937-38 crops would total 1,787,000 bales, only 5 percent below last year's crop. If the yield on this year's acreage amounts to 459 pounds per acre, which is the average for the 5 years ended with 1936-37, a record crop of 1,972,000 bales would be harvested, or one 5 percent above last year's record.

## TOBACCO

Flue-cured tobacco acreage increased in the Orient

The combined 1937 acreage of American type flue-cured tobacco in China, Manchuria, and the Japanese Empire is estimated to be more than 15 percent above the record acreage of 1936, according to a report received from Tobacco Specialist J. Barnard Gibbs in the Shanghai office of the Bureau of Agricultural Economics. Substantial increases over the 1936 acreage are reported for all the producing districts. The increased plantings for 1937 have resulted from high prices paid for the 1936 crop, which gave greater returns per acre for tobacco than for other competing crops, and from direct measures on the part of the Governments encouraging larger acreages. In Japan, Korea, and Formosa, tobacco monopolies required growers in certain districts to shift part of their acreage from native types to flue-cured and also expanded the plantings in established flue-cured districts. In China, the Government has encouraged increased planting by furnishing seeds of flue-cured tobacco and by giving farmers some indication that they will receive satisfactory prices for their 1937 crop.

If growing conditions should result in average yields, the production of flue-cured leaf in China, Manchuria, and the Japanese Empire in 1937 will total approximately 300,000,000 pounds, as compared with the record 1936 crop of 243,000,000 pounds and a 5-year average production for 1931-1935 of 180,000,000 pounds.

If the 1937 production of flue-cured tobacco in the far eastern countries should total 300,000,000 pounds, import requirements of American leaf during the 1937-38 crop year (October to September) are expected to be materially below the imports of American during 1936-37, which are now estimated to total approximately 65,000,000 pounds.

Consumption of flue-cured leaf in far eastern countries during the 1936-37 crop year will be about 300,000,000 pounds of redried tobacco, compared with an estimated consumption in 1935-36 of 267,000,000 pounds and an average during the 4 years 1931-32 to 1934-35 of about 236,000,000 pounds. It is now expected that there will be a slight increase for the 1937-38 season and that the combined consumption may equal 310,000,000 pounds of re-dried leaf, including stems.

Total carryover of flue-cured tobacco at the end of the crop year September 30, 1937, will be lower than previous years, and low in comparison with the large yearly disappearance. Stocks are expected to total about 150,000,000 pounds, as compared with 165,000,000 as of September 30, 1936. During the preceding 4 years the carryover averaged approximately 188,000,000 pounds.

China

Flue-cured tobacco acreage in China for 1937 is estimated fully 15 percent above the record acreage of 1936. Should average yields be obtained, the 1937 production will total about 220,000,000 pounds, compared with the revised estimate of 180,000,000 pounds for 1936.

Exports of Chinese flue-cured tobacco from the 1937 crop, primarily to Manchuria, are expected to be near the export volume for the 1936-37 crop year of approximately 33,000,000 pounds of re-dried leaf. The remaining probable supply for domestic consumption during 1937-38 would be about 172,000,000 pounds, re-dried weight. Total flue-cured consumption in China during 1937-38 is expected to equal approximately the same as that for 1936-37 of 200,000,000 pounds. The deficit of 28,000,000 pounds between the new supply of domestic leaf and consumption will be largely made up of imports from the United States and the Japanese Empire. Imports from the United States may equal about 20,000,000 pounds, compared with the estimated importation of American leaf during 1936-37 of 50,000,000 pounds. Importation of American leaf during the coming year, it is believed, will consist of a larger proportion of stems than in former years, as a result of the increased taxation on cigarette production in China. The increased taxes were much greater on the higher grade cigarettes where a larger percentage of American leaf has been used.

Manchuria

It is estimated that the 1937 acreage of flue-cured tobacco in Manchuria has been increased approximately 20 percent above the 1936 acreage. With average yields, the 1937 crop will total approximately 6,000,000 pounds, as compared with 5,000,000 pounds in 1936. The Manchurian Government and commercial agencies have been encouraging increased production of flue-cured leaf in Manchuria.

Consumption of flue-cured leaf in Manchuria during 1937-38 is expected to show a further increase and will probably total approximately 45,000,000 pounds of re-dried tobacco. Consumption in 1936-37 is estimated at about 43,000,000 pounds, which compares with the average for the 5 years 1931-32 to 1935-36 of about 27,000,000 pounds. The Manchurian 1937-38 flue-cured requirements of about 45,000,000 pounds are expected to be made up approximately as follows: domestic leaf re-dried 5,500,000 pounds, imports from China 27,000,000 pounds, imports from Japan 6,500,000 pounds, and imports of American leaf 6,000,000 pounds.

Japanese Empire

Tobacco monopolies in the Japanese Empire report 1937 planted acreage of flue-cured tobacco approximately 15 percent above the 1936 acreage, which with average yields, would produce approximately 73,000,000 pounds, as compared with 58,000,000 in 1936 and an average production of



44,000,000 pounds during the 5 years 1931-1935. Some decrease is reported in acreage of domestic type tobacco. The trend of increased consumption of flue-cured leaf in the Japanese Empire is expected to continue during the 1937-38 crop year. Total consumption of flue-cured, it is estimated, will be approximately 65,000,000 pounds of re-dried leaf, as compared with about 56,000,000 pounds for the 1936-37 season and 39,000,000 pounds, the average consumption during the 5-year period 1931-32 to 1935-36. The 65,000,000 pounds forecast for flue-cured requirements in 1937-38 are expected to be made up approximately as follows: 57,000,000 pounds of domestic leaf, 4,000,000 pounds of American, and 4,000,000 pounds of Chinese.

FLUE-CURED TOBACCO: Acreage, yield, production and farm price in oriental countries, average 1931-1935, annual 1936 and 1937

Year	Acreage harvested	Yield per acre	Production	Farm price per pound
	<u>Acres</u>	<u>Pounds</u>	<u>1,000 pounds</u>	<u>Cents</u>
CHINA				
Average 1931-1935.....	112,100	1,190	133,399	4.29
1936.....	162,900	1,105	180,005	5.62
1937 <u>a/</u> .....	190,000	1,160	220,400	-
MANCHURIA				
Average 1931-1935.....	3,000	1,000	3,000	3.13
1936.....	5,000	1,000	5,000	3.52
1937 <u>a/</u> .....	6,000	1,000	6,000	-
JAPANESE EMPIRE <u>b/</u>				
Average 1931-1935.....	28,962	1,513	43,815	9.22
1936.....	43,117	1,351	58,241	9.70
1937 <u>a/</u> .....	48,488	1,499	72,667	-
TOTAL				
Average 1931-1935.....	144,062	1,251	180,214	5.47
1936.....	211,017	1,153	243,246	6.55
1937 <u>a/</u> .....	244,488	1,223	299,067	-

Prepared by the Shanghai Office of the Bureau of Agricultural Economics.

a/ Forecast as of June 20, 1937. b/ Total Japan proper, Korea, and Formosa.

FLUE-CURED TOBACCO: Imports into oriental countries, 1931-32 to 1936-37

Crop year October- September	China <u>a/</u>	Manchuria <u>b/</u>	Japanese Empire	Total
	<u>Million pounds</u>	<u>Million pounds</u>	<u>Million pounds</u>	<u>Million pounds</u>
1931-32.....	77.2	9.0	6.5	92.7
1932-33.....	64.5	18.9	7.1	90.5
1933-34.....	83.5	39.4	7.8	130.7
1934-35.....	32.4	22.9	14.3	69.6
1935-36.....	32.7	27.9	10.3	70.9
1936-37 <u>c/</u> ...	54.0	36.0	11.0	101.0

Prepared by the Shanghai Office of the Bureau of Agricultural Economics.

a/ Chinese imports are largely from the United States. b/ Manchurian imports are largely from China. c/ Forecast.



Europe expected to take more United States flue-cured tobacco

The outlook for exports of United States flue-cured tobacco to Europe is good, according to a report from P. G. Minneman, Tobacco Specialist at London. Consumption is increasing and stocks are relatively low. Consumption of cigarettes is increasing in practically all European countries and the popularity of "American" type blended cigarettes containing flue-cured tobacco is gaining in northern and western continental European countries. Stocks in most countries are low, especially in the United Kingdom where imports from the 1936 crop were abnormally small.

European countries constitute our best market for exports of flue-cured tobacco. The United Kingdom alone took over 60 percent of the total exports from the 1936 flue-cured crop and European countries as a whole took about 74 percent of the total exports.

It is estimated that European countries would need to import from the 1937 crop about 50,000,000 pounds more flue-cured leaf than from last year's crop in order to bring stocks up to a normal relationship to consumption. Current supplies of flue-cured tobacco available from other sources, especially from Southern Rhodesia and India, are not sufficient to take care of these increased needs. The current crops from these two countries are no larger than a year ago. The most important other source of supply for European countries is Canada where plantings are reported to be materially increased.

Tobacco consumption as a whole is increasing in Europe with the exception of the southern countries which do not use appreciable quantities of American flue-cured tobacco. With increased industrial activity, consumers' purchasing power is increasing in practically all countries except France, Austria, Switzerland, and Spain. Present indications point to an increase in consumption of approximately 5 percent during the coming crop year. Consumption of cigarettes is increasing more rapidly than that of any other tobacco product, and in the Scandinavian countries, the Netherlands, and Belgium there is an increasing demand for blended cigarettes containing flue-cured tobacco.

European imports from the 1936 American flue-cured crop are estimated at about 202,000,000 pounds (stemmed plus unstemmed leaf without conversion to unstemmed leaf equivalent), nearly 30 percent less than from the 1935 crop. This decrease during the 1936-37 marketing year is almost entirely due to smaller imports by the United Kingdom because British manufacturers considered the crop of a character less suitable for their requirements.

The combination of increased consumption and reduced imports has resulted in low stocks in relation to consumption. It is estimated that

the total stocks of American flue-cured tobacco in Europe on July 1 were about 361,000,000 pounds, or slightly less than a year earlier when consumption was at a lower level. In some countries, such as Germany and some of the Baltic countries, stocks are quite low and requirements are imported on a hand-to-mouth basis.

EUROPE: Estimated net imports and consumption of American flue-cured tobacco, by countries, July-June 1936-37, and stocks on July 1, 1937

Country	July-June 1936-37		Stocks on July 1, 1937
	Net imports	Consumption	
	Million pounds	Million pounds	Million pounds
United Kingdom.....	168.0	181	312
Irish Free State.....	8.0	8	16
Scandinavian Countries <u>a/</u> ...	10.0	9	9
Netherlands .....	7.0	8	15
Belgium.....	4.0	3	5
Germany.....	2.0	2	1
Poland.....	0.5	1	1
France.....	0.5	1	1
Other European Countries.....	2.0	2	1
Total.....	202.0	215	361

a/ Denmark, Norway, Sweden, and Finland.

#### FRUITS, VEGETABLES, AND NUTS

##### Deciduous fruit shipments from South Africa to United Kingdom decline

Shipments of deciduous fruit from South Africa to the United Kingdom during the 1936-37 season, November to June, amounted to around 3,395,000 packages compared with the record movement of 4,288,255 in 1935-36 and with 3,269,602 packages in 1934-35, according to the Weekly Fruit Intelligence Notes of the Imperial Economic Committee. Shipments declined about 21 percent in 1936-37 as compared with the preceding year. All the principal fruits except grapes were substantially lighter than in 1935-36, while those of peaches, pears, plums, apricots, and apples were also lighter than in the 1934-35 season. This season's shipment of 1,849,014 packages of grapes, however, established a new record. The principal deciduous fruit exports from South Africa are grapes, plums and prunes, pears, and peaches.

##### Estimates of Isle of Pines grapefruit crop revised upward

The 1937-38 estimate of the export grapefruit crop in the Isle of Pines, Cuba, has been revised upward from 125,000 boxes reported in May to 160,000 or 175,000 boxes, as reported by Consul Harold S. Towell at Habana. Favorable growing conditions in the past 6 weeks have caused the fruit to develop in size and instead of a crop of small fruit suitable

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chiefly for export to the United Kingdom, where small sizes are preferred, the crop is now expected to run to medium and large sizes and most of it will be sold in the United States. First shipments of the new crop were expected to be made around July 21. Exports during the 1936-37 season amounted to 198,538 boxes. Mr. Tewell states that the crates and wrappers used in packing Isle of Pines grapefruit are all imported from the United States, where this season about \$30,000 will be spent for packing materials.

#### Mexican West Coast vegetable exports increase

Exports of vegetables from the West Coast of Mexico increased sharply during the 1936-37 season as compared with the two preceding seasons because of generally favorable prices in the United States, according to a communication from Thomas M. Powell, American Vice Consul at Nogales. Total shipments from November to June, 1936-37, were 3,757 cars compared with 2,787 in 1935-36 and 2,801 in 1934-35. Although exports showed a sharp increase in 1936-37 they were far below those of 1931-32 and other predepression years. Prices for fresh vegetables remained low on the United States markets during the first few months of the shipping season but took a sharp advance after January and remained favorable until the latter part of May. During the period of favorable prices, a majority of the shippers realized good profits which more than offset any losses incurred earlier in the season.

The increase in shipments of vegetables from the Mexican West Coast was made up largely of tomatoes and green peas. The exports of tomatoes increased from 2,317 cars in the 1935-36 season to 3,089 cars in 1936-37. Green peas increased from 198 to 377 cars. Green pepper exports declined from 170 to 159 cars. Exports of mixed vegetables showed some increase, or from 97 to 131 cars. Both tomato and green pea exports were stimulated by attractive prices which were brought about by unfavorable weather in the early vegetable sections of Florida and California.

#### LIVESTOCK, MEATS, AND WOOL

##### Market active at closing of London wool sales

The fourth series of the London colonial wool sales for 1937 closed on July 16 with the general tone of the market active on most types of wool, it was reported by Agricultural Attache C. C. Taylor at London. The chief buyers of merinos and punta arenas were from Great Britain, France, and Switzerland. Central European buyers took a few merinos. No wool was bought by Soviet Union bidders and practically none by American, in spite of the excellent selection of slipes offered.

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## INTERNATIONAL TRADE IN COTTON, AUGUST-MAY, 1936-37

The volume of cotton entering into world trade in the first 10 months of the present cotton season, August 1936 to May 1937, amounted to 11,153,000 bales. This was considerably larger than the volume exported in the like period of the 2 years immediately preceding but was a little under the 10-year average.

The United States supplied a smaller share of world exports than during the 1936 season, while the proportions supplied by Brazil, British India, and Egypt increased. In the 10 years, 1923-24 to 1932-33, the United States supplied 66 percent as against 48 percent so far this season. The increases in exports from British India and Brazil are the most significant. British India's share of the world total, which amounted to 20 percent in the 10 years ended in 1932-33, had risen to 27 percent in 1936-37, while Brazil, which supplied less than 1 percent in the earlier period, now supplies 6 percent of the world total.

Principal exporting countries

United States: The United States exported 5,322,000 bales of cotton in the 10 months ended May 31, 1937. This was considerably less than was exported a year earlier and a decrease of 30 percent when compared with the 10-year average of 7,524,000 bales. Of this total, 1,538,000 bales went to Japan, exceeding both the 2 preceding years and also the 10-year average. The United Kingdom took 1,112,000 bales as against an average for the 10-year period of 1,686,000 bales, a decrease of 34 percent. In contrast with the decline in exports to all the leading European markets, exports to Sweden and Canada show a slow but almost continuous upward trend. Exports to Canada rose from an average for the 10-year period of 188,000 bales to 277,000 bales in 1936-37, a gain of 48 percent.

British India: British India exported 18 percent more cotton this season than last, and for the first time passed the 3,000,000-bale mark, the total standing at 3,058,000 bales. This compared with a 10-year average of 2,332,000 bales and 2,584,000 bales a year ago. The outstanding feature of the Indian trade is the increase in exports to Japan. So far this season, Japanese markets have absorbed 1,733,000 bales, a new high record. This compares with the 1,337,000 bales sent to Japan in the same 10 months of 1935-36 which was the highest up to that time. The United Kingdom, the second most important market took 395,000 bales. This was considerably more than double the average exports to that market in the August-May period of 1923-24 to 1932-33 and a gain of 20,000 bales over the same period a year ago. Belgium is also taking more of the Indian fiber but exports to China, Germany, France, Spain, and the Netherlands have dropped below the 10-year average and also below last year.

Egypt: During the 10 months ended May 31, foreign countries took 1,681,000 bales of Egyptian cotton, a peak figure. This compares with an average of 1,292,000 bales exported in the August-May period, 1923-24 to 1932-33 and with the 1,509,000 bales exported last season. Most of the gain



## INTERNATIONAL TRADE IN COTTON, AUGUST-MAY, 1936-37, CONT'D

was in increased shipments to the United Kingdom and Japan but exports to Italy, Switzerland, Czechoslovakia, and British India also increased.

Brazil: Total exports from Brazil in the August-May period of 1936-37, approximated 713,000 bales or nearly nine times the 10-year average. This compares with 472,000 in 1935-36 and represents a gain of 51 percent. Germany and the United Kingdom are the heaviest purchasers of Brazilian cotton, taking considerably more than 200,000 bales each. Exports to Japan increased from less than 1,000 bales in 1934-35 to 75,000 bales in the 9 months ended April 30, 1937.

Argentina and Peru: The short crop in Argentina has affected exports adversely; shipments for the 10 months ended May 31 amounted to 131,000 bales. This was under the peak exports of last year, which totaled 145,000 bales, but exceeded those of any other like period. Exports from Peru with a total of 248,000 bales also fell behind the high record of last season when exports amounted to 258,000 bales. Germany and the United Kingdom are the principal outlets for both Peruvian and Argentine cotton.

COTTON: Summary of world trade, August-May, average  
1923-24 to 1932-33 and seasons, 1933-34 to 1936-37

Exporting countries	August-May				
	Quantity				
	Average 1923-24 to 1932-33	1933-34	1934-35	1935-36	1936-37
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
United States.....	7,524	7,161	4,383	5,792	5,322
British India.....	2,332	2,203	2,244	2,584	3,058
Egypt.....	1,292	1,670	1,476	1,509	1,681
Brazil.....	80	188	603	472	a/ 713
Peru.....	150	181	211	258	248
Argentina.....	56	63	97	145	131
Total.....	11,434	11,456	9,014	10,760	11,153
	Percentage of total				
	Percent	Percent	Percent	Percent	Percent
United States.....	66	61	49	54	48
British India.....	20	19	25	24	23
Egypt.....	11	15	16	14	15
Brazil.....	1	2	7	4	6
Peru.....	1	2	2	3	2
Argentina.....	1	1	1	1	1
Total.....	100	100	100	100	100

Compiled from official sources.

a/ Statistics for May estimated at 40,000 bales.

## INTERNATIONAL TRADE IN COTTON, AUGUST-MAY, 1936-37, CONT'D

COTTON: Destination of exports from the principal exporting countries, August-May average 1923-24 to 1932-33 and seasons 1934-35 to 1936-37 a/

Destination of exports from principal exporting countries	August-May							
	Quantity				Percentage of total			
	Average 1923-24 to 1932-33	1934-35	1935-36	1936-37	Average 1923-24 to 1932-33	1934-35	1935-36	1936-37
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	Percent	Percent	Percent	Percent
<u>Exports from the United States to</u>								
Germany* .....	1,734	302	754	629	23	7	13	12
United Kingdom	1,686	683	1,313	1,112	22	16	23	21
France .....	821	357	676	676	11	8	12	13
Italy .....	640	434	368	362	8	10	6	7
Spain .....	276	238	207	b/	4	5	4	c/
Belgium .....	179	86	161	156	2	2	3	3
U.S.S.R. (Russia) d/ ...	141	18	0	1	2	c/	0	c/
Netherlands ...	131	56	66	90	2	1	1	2
Sweden .....	55	81	78	86	1	2	1	2
Portugal .....	41	38	50	36	1	1	1	1
Poland & Danzig	21	194	255	170	c/	4	4	3
Other Europe ..	59	87	95	117	1	3	1	1
Total Europe	5,784	2,574	4,023	3,435	77	59	69	65
Canada .....	188	194	230	277	3	4	4	5
Japan .....	1,200	1,432	1,457	1,538	16	33	25	29
China .....	257	111	36	15	3	3	1	c/
British India .	79	50	7	14	1	1	c/	c/
Other countries	16	22	39	43	c/	c/	1	1
Total .....	7,524	4,383	5,792	5,322	100	100	100	100
<u>British India to</u>								
Japan .....	1,100	1,203	1,337	1,733	47	54	52	57
Italy .....	255	210	75	170	11	9	3	6
China .....	252	81	87	10	11	4	3	c/
Germany .....	164	106	208	134	7	5	8	4
Belgium .....	157	125	171	263	7	6	7	9
United Kingdom	149	258	375	395	6	11	15	13
France .....	119	113	124	106	5	5	5	3
Spain .....	52	44	48	b/ e/	2	2	2	c/
Netherlands ...	32	31	32	e/ 31	1	1	1	1
Other countries	52	74	127	216	3	3	4	7
Total .....	2,332	2,245	2,584	3,058	100	100	100	100

\* Includes shipments through the free port of Bremen, much of which is afterward reshipped to other countries. According to German official trade returns, imports of American cotton for consumption in Germany amounted to 167,000 bales in the August-May period of 1936-37; 404,000 bales in 1935-36; and 308,000 bales in 1934-35.

Continued -

## INTERNATIONAL TRADE IN COTTON, AUGUST-MAY, 1936-37, CONT'D

COTTON: Destination of exports from the principal exporting countries, August-May average 1923-24 to 1932-33 and seasons 1934-35 to 1936-37, cont'd

Designation of exports from principal exporting countries	August-May							
	Quantity				Percentage of total			
	Average 1923-24 to 1932-33	1934-35	1935-36	1936-37	Average 1923-24 to 1932-33	1934-35	1935-36	1936-37
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	Percent	Percent	Percent	Percent
Exports from Egypt to								
United Kingdom	507	402	514	575	39	27	34	34
France .....	167	168	211	190	13	11	14	11
United States .	152	49	48	58	12	3	3	3
Germany .....	93	112	136	126	7	8	9	8
Italy .....	86	130	73	97	7	9	5	6
Japan .....	58	158	106	205	4	11	7	12
Switzerland ...	57	61	50	70	4	4	3	4
U.S.S.R.								
(Russia) ....	41	f/	f/	f/	3	---	---	---
Spain .....	42	89	85	1	3	6	6	c/
Czechoslovakia	27	40	58	69	2	3	4	4
British India .	22	112	63	81	2	8	4	5
Poland & Danzig	11	33	30	29	1	2	2	2
Other countries	29	122	130	180	3	8	9	11
Total .....	1,292	1,476	1,509	1,631	100	100	100	100
August-April								
Brazil to								
Germany .....		208	186	215		36	44	32
United Kingdom		221	111	211		38	26	32
Japan .....		b/	22	75		c/	5	11
Italy .....		17	7	40		3	2	6
France .....		50	34	34		9	8	5
Belgium-Luxem.		36	29	20		6	7	3
Portugal .....		22	8	19		4	2	3
Netherlands ...		20	17	17		4	4	3
Poland .....		1	4	13		c/	1	2
Other countries		2	1	19		c/	1	3
Total .....	g/ 77	577	419	663	100	100	100	100

Compiled from official sources.

a/ Bales of 478 pounds net, except for the United States which are in bales of 500 pounds gross. b/ Less than 500 bales. c/ Less than 0.5 percent. d/ Beginning January 1, 1935, includes Russia in Asia. e/ Eight months, August-March. f/ If any, included in "Other countries". g/ No data available by countries.



GERMANY: Price per metric ton to producers fixed for specified grains  
in Central District, 1936-37 and 1937-38

Date	Wheat		Rye		Feed oats		Feed barley	
	1936-37	1937-38	1936-37	1937-38	1936-37	1937-38	1936-37	1937-38
	Reichs- mark	Reichs- mark	Reichs- mark	Reichs- mark	Reichs- mark	Reichs- mark	Reichs- mark	Reichs- mark
July 1 to July 9..	-	-	-	178	-	-	-	162
July 10 to July 15	-	-	-	185	-	-	162	167
July 16 to July 31	-	-	158	185	-	-	162	167
Aug. 1 to Aug. 9..	-	187	158	185	-	156	162	167
Aug. 10 to Aug. 15	-	194	158	185	-	156	162	167
Aug. 16 to Aug. 31	187	194	158	185	156	156	162	167
September.....	189	194	160	185	156	159	164	169
October .....	191	194	162	187	158	161	166	171
November.....	193	196	164	189	160	163	168	172
December.....	201	199	172	191	162	165	170	174
January.....	201	201	172	191	164	168	172	175
February.....	201	201	172	191	166	170	174	176
March.....	201	201	172	191	168	172	176	176
April.....	201	200	172	190	170	172	178	176
May.....	201	200	172	188	172	172	180	173
June.....	201	200	172	185	174	168	182	169
July.....	201	200	-	-	174	164	-	-

Berlin office, Bureau of Agricultural Economics. Wheat and oats on an August-July basis, rye and barley, July-June. Central District is one of a number of price districts.

NETHERLANDS: Production of specified grains, 1932-1937

Year	Wheat	Rye	Barley	Oats
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
1932.....	12,838	13,863	2,497	19,103
1933.....	15,325	15,601	2,311	20,004
1934.....	18,195	19,788	4,546	19,805
1935.....	16,653	18,434	5,234	19,379
1936.....	16,259	20,078	5,512	18,085
1937 <u>a/</u> .....	12,640	16,534	6,246	21,633

International Institute of Agriculture, Rome. a/ Preliminary.



WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries  
as given by current trade sources, 1934-35 to 1936-37

Country	Total shipments		Shipments 1937 week ended			Shipments July 1-July 17	
	1934-35	1935-36	July 3	July 10	July 17	1936	1937
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America a/.....	163,832	219,688	4,024	1,259	2,513	16,408	7,796
Canada,							
4 markets b/.....	176,059	246,199	1,314	956	1,273	9,617	2,229
United States c/.....	31,532	15,930	370	239	174	320	783
Argentina.....	186,228	77,384	1,084	1,411	670	2,372	3,165
Australia.....	111,628	110,060	2,168	2,050	1,120	2,244	5,338
U.S.S.R.....	1,672	30,224	0	0	0	0	0
Danube							
and Bulgaria d/.....	4,104	8,216	800	808	120	920	1,728
British India.....	c/2,318	c/2,529	816	1,008	544	96	2,368
Total.e/.....	468,782	448,101				22,040	20,395
Total European shipments a/.....	387,752	355,032	7,400			f/360,264	f/484,600
Total ex-European shipments a/.....	147,938	133,528	1,976			f/130,056	f/125,624

Compiled from official and trade sources. a/ Broomhall's Corn Trade News.  
b/ Fort William, Port Arthur, Vancouver, Prince Rupert, and New Westminster.  
c/ Official. d/ Black Sea shipments only. e/ Total of trade figures includes North America as reported by Broomhall. f/ To July 3.

HUNGARY: Production of specified grains, 1932-1937

Year	Wheat	Barley	Oats
	1,000 bushels	1,000 bushels	1,000 bushels
1932.....	64,463	33,029	21,756
1933.....	96,356	38,647	24,637
1934.....	64,824	24,983	17,868
1935.....	84,224	25,557	16,941
1936.....	87,789	30,237	18,049
1937 a/.....	69,629	22,322	15,639

International Institute of Agriculture, Rome. a/ Second official estimate.

WHEAT: Closing Saturday prices of September futures a/

Date	Chicago		Kansas City		Minneapolis		Winnipeg <u>b/</u>		Liverpool <u>b/</u>		Buenos Aires <u>c/</u>	
	1936:1937		1936:1937		1936:1937		1936:1937		1936:1937		1936:1937	
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High <u>d/</u> ...	110	128	106	124	125	144	94	146	102	146	<u>e/</u> 98	<u>f/</u> 129
Low <u>d/</u> ....	83	106	79	102	85	110	75	108	82	118	<u>e/</u> 90	<u>f/</u> 108
June 26...	94	116	90	112	107	128	82	126	90	132	92	<u>g/</u> 118
July 3...	102	127	97	122	115	141	87	140	92	141	93	<u>g/</u> 123
10...	104	122	101	118	120	138	90	137	101	140	97	122
17...	102	128	102	124	119	143	92	146	102	146	<u>h/</u> 98	125

a/ October futures for Winnipeg and Liverpool. b/ Conversions at noon buying rate of exchange. c/ Prices are of day previous to other prices. d/ April 1 to date; Buenos Aires June 1 to date. e/ August, September and October futures. f/ August and September futures. g/ August futures. h/ October futures....

## WHEAT: Weekly weighted average cash price at stated markets

Week ended	All classes and grades		No. 2 Hard Winter		No. 1 Dk.N.Spring		No. 2 Hard Amber Durum		No. 2 Red Winter		Western White	
	six markets		Kansas City		Minneapolis		Minneapolis		St. Louis		Seattle <u>a/</u>	
	1936:1937		1936:1937		1936:1937		1936:1937		1936:1937		1936:1937	
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High <u>b/</u> ...	109	146	111	144	139	170	149	199	110	147	90	122
Low <u>b/</u> ....	87	122	91	120	108	136	103	109	95	120	78	110
June 26...	102	125	102	120	133	152	128	132	98	120	86	114
July 3...	99	122	100	121	124	152	125	148	96	128	82	117
10...	109	122	111	122	139	156	142	142	106	125	90	114
17...	109	123	111	125	135	153	149	133	105	124	88	

a/ Weekly average of daily cash quotations, basis No.1 sacked. b/ April 1 to date.

## WHEAT: Price per bushel at specified European markets, 1935-36 and 1936-37

Year beginning July	Range	Rotterdam				Berlin <u>c/</u>	Paris	England and Wales
		Hard Winter No.2	Manitoba No.3	Argentina <u>a/</u>	Australia <u>b/</u>			
		Cents	Cents	Cents	Cents		Domestic Cents	Cents
1935-36 <u>d/</u>	High	<u>e/</u> 103	104	98	98	232	188	91
	Low	<u>e/</u> 74	82	63	71	209	121	59
1936-37 <u>d/</u>	High	<u>e/</u> 154	165	150	151	233	204	134
	Low	<u>e/</u> 101	99	99	100	209	177	91
Week ended:								
June 3..		<u>e/</u> 136	135	135	139	222	-	131
10..		<u>e/</u> 129	129	130	132	222	-	130
17..		<u>e/</u> 132	132	130	132	222	-	129
24..		<u>e/</u> 132	136	129	133	222	-	126
July 1..								126

Prices at Paris are of day previous to other prices. Prices in England and Wales are for week ending Saturday. Conversions made at current exchange rates. a/ Barusso. b/ F.A.Q. c/ Producers' fixed price from August 16, 1934. d/ July 1 to date. e/ Nominal.

**FEED GRAINS AND RYE: Weekly average price per bushel of corn, rye, oats, and barley at leading markets a/**

Week ended	Corn						Rye		Oats		Barley	
	Chicago		Buenos Aires		Minneapolis		Chicago		Minneapolis			
	No. 3 Yellow	Futures	Futures	Futures	No. 2	No. 2	No. 3 White	No. 2	No. 2	No. 2	No. 2	No. 2
	1936	1937	1936	1937	1936	1937	1936	1937	1936	1937	1936	1937
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High b/....	89	138	85	127	46	57	77	117	38	55	92	137
Low b/.....	59	108	59	101	42	51	48	95	25	45	58	72
			July	July	July	July						
June 19....	64	114	64	113	43	51	58	95	28	47	61	79
			Sept.	Sept.	Sept.	Aug.						
26....	67	118	65	105	43	53	65	103	31	47	68	93
July 3....	69	126	69	112	43	55	66	96	32	51	74	92
10....	80	128	80	114	46	55	77	97	38	51	87	94
17....	89	128	85	113	46	56	75	101	37	48	92	97

a/ Cash prices are weighted averages of reported sales; future prices are simple averages of daily quotations. b/ For period January 1 to latest date shown.

**FEED GRAINS: Movement from principal exporting countries**

Commodity and country	Exports for year		Shipments 1937, week ended a/			Exports as far as reported		
	1935-36	1936-37	July 3	July 10	July 17	July 1 to	1936-37 b/	1937-38 b/
	bushels	bushels	bushels	bushels	bushels	to	bushels	bushels
<b>BARLEY, EXPORTS: c/</b>	1,000	1,000	1,000	1,000	1,000		1,000	1,000
United States.....	9,886	5,192	5	58	0	July 17	166	63
Canada.....	6,832	18,880						
Argentina.....	9,994	15,597	60	110	51	July 17	241	161
Danube & U.S.S.R.	41,090	26,315	223	333	0	July 17	972	338
Total.....	57,852	65,984					1,379	562
<b>OATS, EXPORTS: c/</b>								
United States....	1,429	832	0	0	1	July 17	0	1
Canada.....	14,892	10,075						
Argentina.....	10,855	24,600	621	379	124	July 17	97	503
Danube & U.S.S.R.	1,390	940	0	0	100	July 17	130	100
Total.....	28,566	36,447					227	604
<b>CORN, EXPORTS: d/</b>	1934-35	1935-36				Nov. 1 to	1935-36	1936-37
United States....	880	885	3	0	5	July 17	362	246
Danube & U.S.S.R.	14,939	14,984	1,148	425	34	July 17	10,637	23,222
Argentina.....	256,143	307,638	6,038	8,087	6,277	July 17	186,229	287,207
South Africa.....	31,882	8,913	680	600	1,105	July 17	6,778	6,428
Total.....	293,844	332,420					204,306	317,103
United States imports.....	41,141	24,521						

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Year beginning November 1.



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